

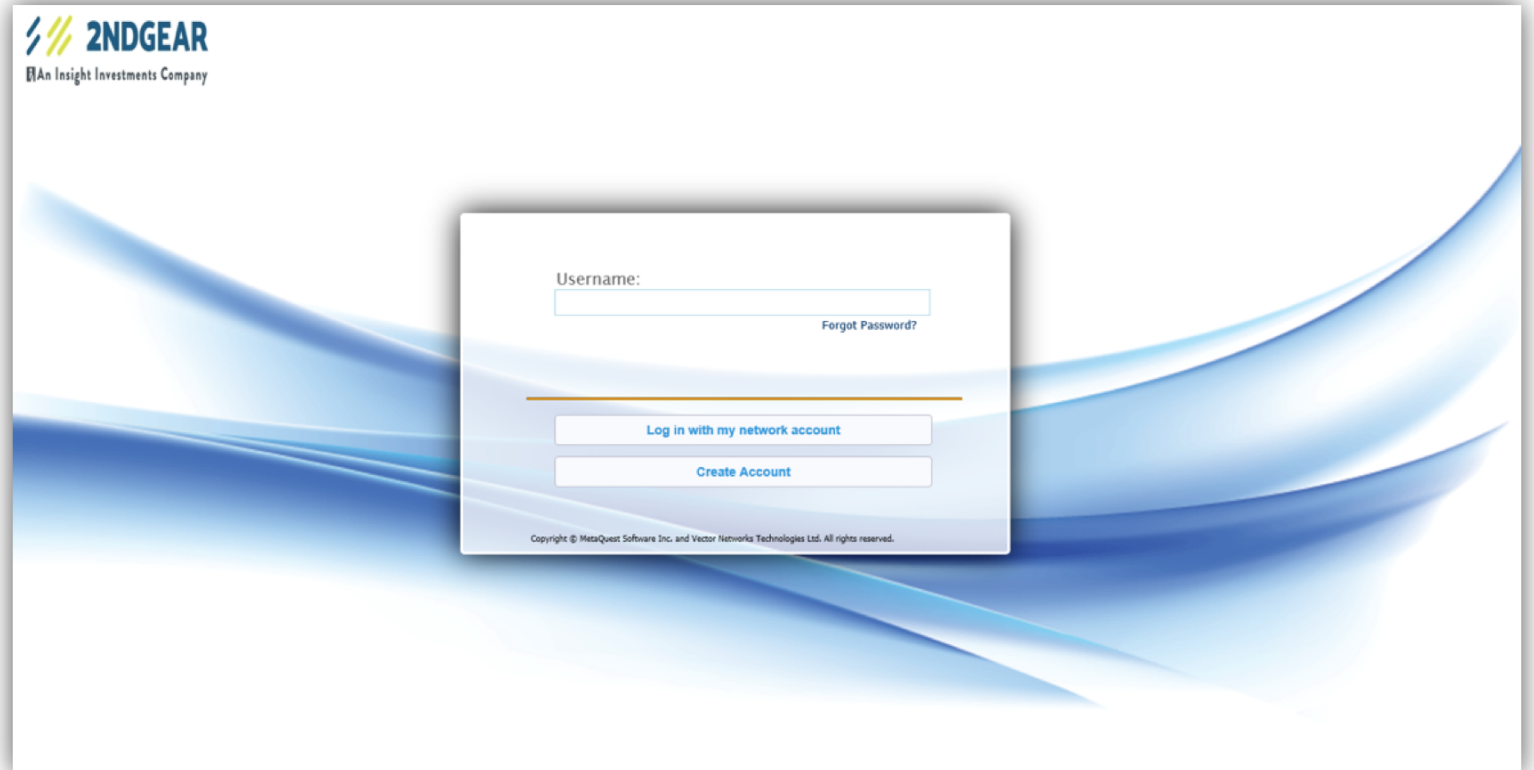


How To Navigate through the  
New Customer Service Portal

# WELCOME

The updated Customer Service Portal offers new ways of finding and adding required information for submitting:

- Requests for service
- Requests for support
- Requests for replacement of unit(s)





# INSTRUCTION SECTIONS

1. Logging In
2. Homepage
3. Creating a New Ticket
4. Adding Serial Numbers
5. Search Options
6. Submitting a Ticket



# LOGGING IN

To access the portal go to <https://customerservice.2ndgear.com>

A. For customers with existing accounts:

- 1) Enter in your existing username.
- 2) Click on “**Forgot Password?**” to reset your password. (Your original password will not be valid for the new portal.)

B. For customers without an existing account, click on “**Create Account**” and follow prompts to setup your account and log in.

**2NDGEAR**  
An Insight Investments Company

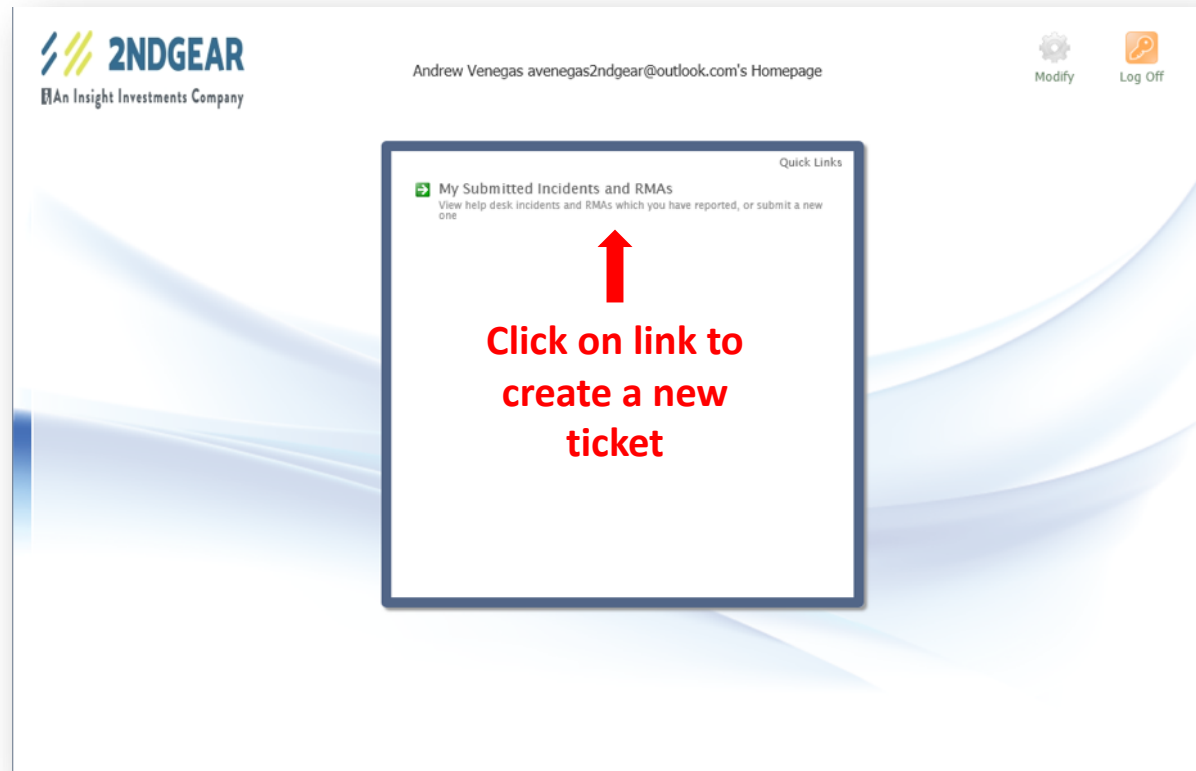
Username:

Password:  [Forgot Password?](#)

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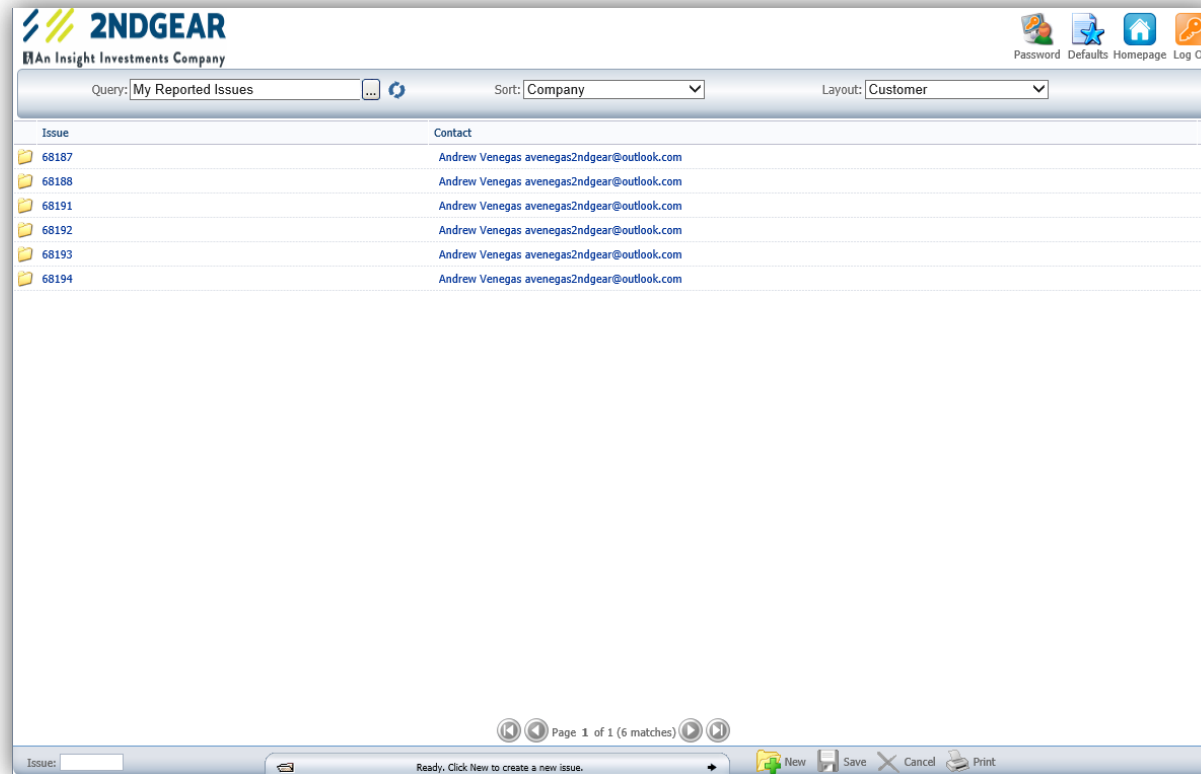
# HOMEPAGE

Once logged in to the portal, you're taken directly to the Homepage. From the Homepage, you're able to access your "Submitted Incidents and RMAs" and create new ones.



# CREATING A NEW TICKET

Once you click the link on the Homepage, you're taken to the list of previously created tickets. From here you can review your tickets and create a new one.



# CREATING A NEW TICKET

To create your new ticket:

1. Go to the bottom of the page.
2. Click on the “**New**” icon (folder with green plus sign) to create a new ticket.

dgear@outlook.com  
dgear@outlook.com  
dgear@outlook.com  
dgear@outlook.com  
dgear@outlook.com  
dgear@outlook.com

1 of 1 (6 matches) ▶ ▶



New



Save



Cancel



Print

# CREATING A NEW TICKET

3. After clicking on the “New” icon, three tabs will appear:
  1. Ticket
  2. RMA Ticket
  3. Issues

As you navigate through each of the tabs, you will be able to input your data to create your ticket.

The screenshot displays the 2NDGEAR An Insight Investments Company interface. At the top, the logo and company name are visible. Below the header, there is a search bar with the text "Query: My Reported Issues" and a "Sort: Company" dropdown. A table lists several issues with columns for "Issue" and "Contact". The "Issue" column contains folder icons and issue numbers (68187, 68188, 68189, 68191, 68192). The "Contact" column lists "Andrew Venegas avenegas2ndgear". Below the table, there are three tabs: "Ticket", "RMA Ticket", and "Issues". The "Ticket" tab is selected and highlighted with a red box. Below the tabs, there are input fields for "Company:" (Lake Dallas ISD) and "Contact:" (Andrew Venegas avenegas2ndgear@outlook.com). At the bottom, there is an "Issue:" input field with the value "68184" and a "New issue creation." button.

Issue	Contact
68187	Andrew Venegas avenegas2ndgear
68188	Andrew Venegas avenegas2ndgear
68189	Andrew Venegas avenegas2ndgear
68191	Andrew Venegas avenegas2ndgear
68192	Andrew Venegas avenegas2ndgear

Query: My Reported Issues Sort: Company

Ticket RMA Ticket Issues

Company: Lake Dallas ISD

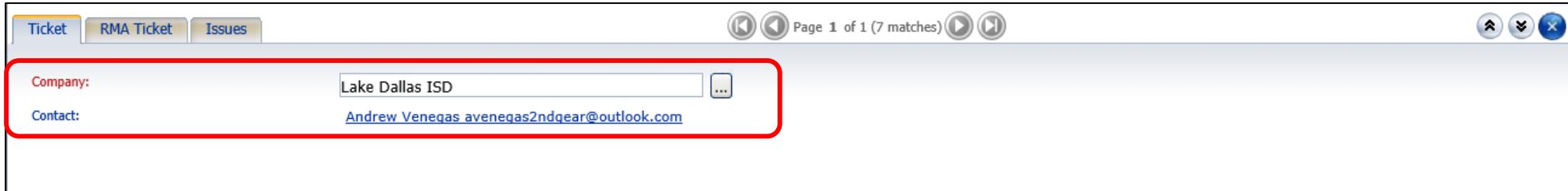
Contact: Andrew Venegas avenegas2ndgear@outlook.com

Issue: 68184 New issue creation.



# ADDING SERIAL NUMBERS

1. On the Ticket tab (first tab), you will see the company name, your contact name, and email address.



A screenshot of a web application interface. At the top, there are three tabs: 'Ticket' (selected), 'RMA Ticket', and 'Issues'. To the right of the tabs is a pagination control showing 'Page 1 of 1 (7 matches)' and navigation buttons. Below the tabs, a red rectangular box highlights a section containing two fields: 'Company:' with the value 'Lake Dallas ISD' and a dropdown arrow, and 'Contact:' with the value 'Andrew Venegas' and the email address 'avenegas2ndgear@outlook.com'.

2. On the RMA Ticket tab (second tab), you will select the shipping address by clicking on the “...” button.



A screenshot of the same web application interface, but with the 'RMA Ticket' tab selected. The 'Ticket' tab is now greyed out. The main content area shows a 'Shipping Address:' label followed by an empty text input field and a dropdown arrow button. A large red arrow points directly to this dropdown arrow button.

# ADDING SERIAL NUMBERS

3. After clicking on the “...” button on the RMA Ticket tab, a pop up window will appear, allowing you to choose from a list of addresses on your account.
4. Select the appropriate address.
5. Click **OK**.

Sort: Company Layout: Cus

Contact

Andrew Venegas.avenegas2ndgear@outlook.com

Select the value for the Shipping Address field

Filter values where the Value Starts with...

Address 1	Address 2	City	Address ID
104 Swisher Rd		Lake Dallas	75065_AP2
Attn: Account Payable	315 E Hundley Dr	Lake Dallas	75065_AP
Attn: Receiving	3501 Cliff Oaks Dr	Corinth	76210_01
Attn: Vanessa Mayo	325 E Hundley Dr	Lake Dallas	75065_01
Mike Dabney	325 E Hundley	Lake Dallas	75065_02

Page 1 of 1 (5 matches)

Shipping Address:

OK Cancel

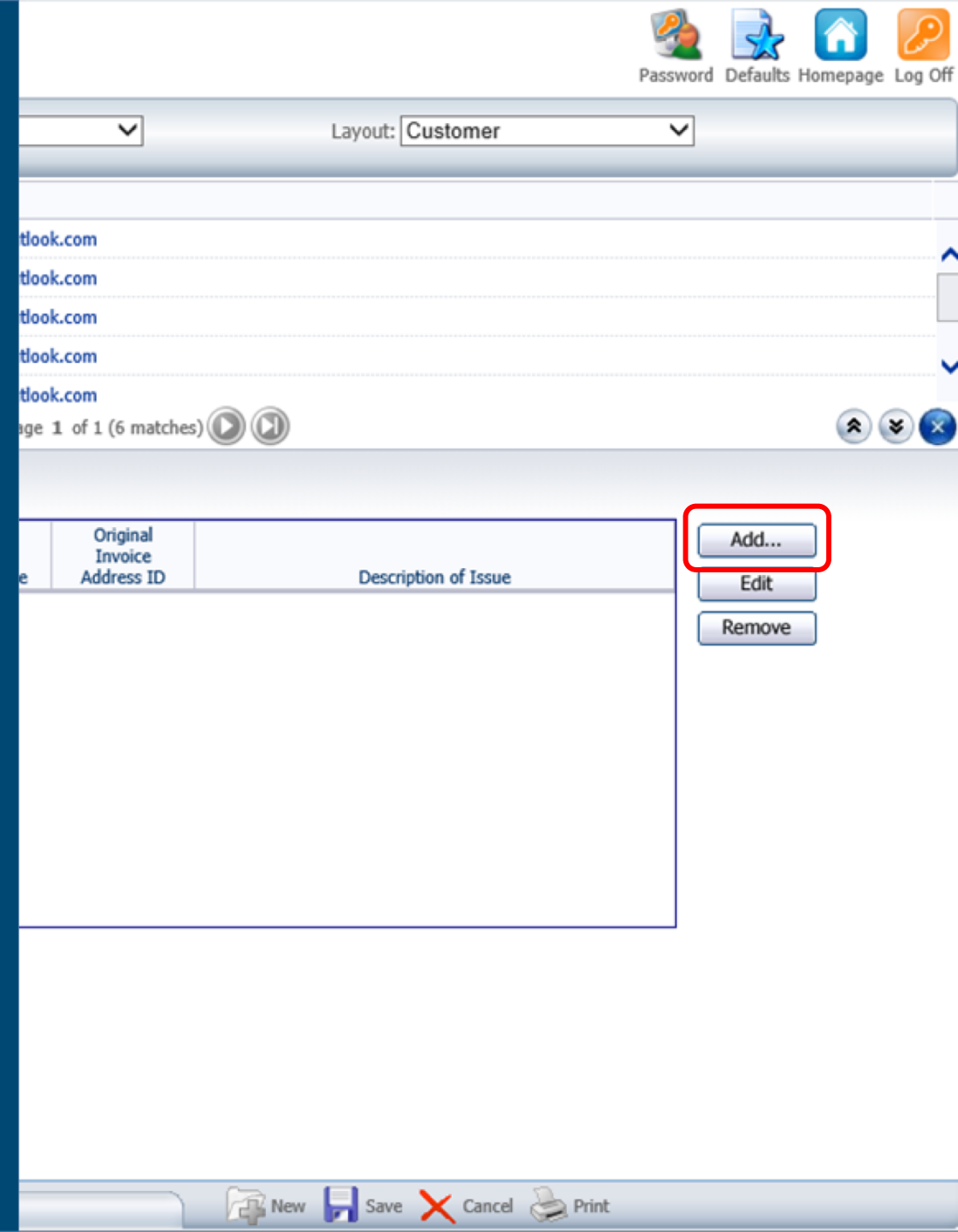
New issue creation. New Save X Ca

# ADDING SERIAL NUMBERS

6. On the Issues tab (last tab), you're able to add the defective item.
7. To add your serial number(s) or defective item, click on the **"Add..."** button.

## TIP

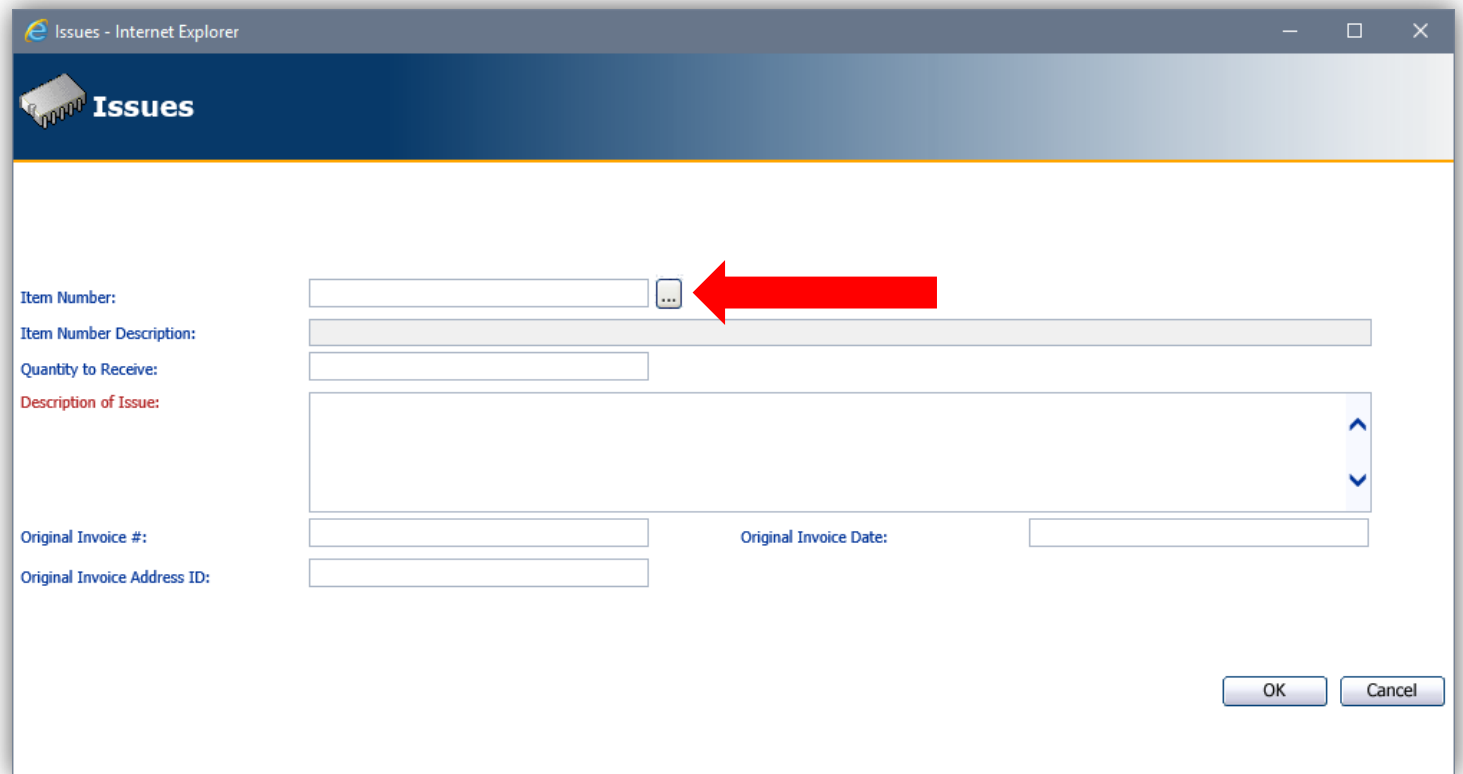
From the Issues tab, you're also able to **"Edit"** and **"Remove"** items before your ticket is saved.



# SEARCH OPTIONS

After clicking “Add” from the Issues tab, the Issues window will appear. This is where you will be able to search for your defective item.

1. To begin the search for your defective item, click on the “...” button (located next to the Item Number field).



The screenshot shows a web browser window titled "Issues - Internet Explorer". The page has a dark blue header with the word "Issues" and a small circuit board icon. Below the header, there is a form with several input fields. A red arrow points to a small button with three dots ("...") located next to the "Item Number" field. The form fields are labeled as follows:

- Item Number: [input field] ...
- Item Number Description: [input field]
- Quantity to Receive: [input field]
- Description of Issue: [text area]
- Original Invoice #: [input field]
- Original Invoice Date: [input field]
- Original Invoice Address ID: [input field]

At the bottom right of the form, there are two buttons: "OK" and "Cancel".

# SEARCH OPTIONS

2. After clicking on the “...” button, the Item Search window will appear. From here you can search by:

- PO # or Invoice #
  - To switch the search from PO # to Invoice #, click on the underlined “PO #”.
- Serial/Item #
- Item Description

## TIP

You can also scroll through the list of available invoices in the Value field to find the item you’re looking for.

Item Number - Internet Explorer

Select the value for the Item Number field

Search by PO #  
Invoice #  
PO #

Search by Serial/Item #:

Search by Item Description:

Value

INV155559  
INV165956  
INV166227  
INV166613  
INV168327  
INV169210  
RMAINV24754

Page 1 of 1 (7 matches)

Invoice #: INV155559  
SOP #: ORD173383  
Customer: Lake Dallas ISD

Quantity	Item Number	Description
7	PCD_HPXX_8200_SFF_016	HP 8200 SFF
11	PCD_HPXX_8200_SFF_013	HP 8200 SFF
12	PCD_HPXX_8200_SFF_002	HP 8200 SFF
30	PPCD_LOGT_COMBO-USB_01	++LC
30	ISE_LOAD_OS	Load
30	ISE_3-YEAR_WARRANTY_PCD	3-Year
30	DSP_HPXX_LA1951G_LCD_001	19" S
30	ISE_3-YEAR_WARRANTY_LCD	3-Year
1	FRT.	

Item Number:



# SEARCH OPTIONS

3. Once you enter information into one of the search fields, click on the “Refresh” icon next to the filled search field.
4. The search return will identify the:
  - a) Invoice
  - b) Item Number
  - c) Description of Item

The screenshot shows a web application window titled "Item Number - Internet Explorer". The main heading is "Select the value for the Item Number field". On the left, there are three search options: "Search by PO #", "Search by Serial/Item #:", and "Search by Item Description:". The "Search by Serial/Item #:" field is filled with "2UA0460J0F" and has a green refresh icon next to it, which is highlighted with a red box. Below these fields is a "Value" section showing "INV166613" with a red arrow pointing to it. At the bottom of the left panel, there are navigation buttons and the text "Page 1 of 1 (1 matches)".

On the right, there is a summary section with the following data:

Invoice #:	INV166613	Invoice Date:	10/2/2014	Address ID:	75065_01
SOP #:	ORD191597	Purchase Order No.:	4110120031		
Customer:	Lake Dallas ISD	Salesperson:	MC1		

Below this is a table with the following data:

Quantity	Item Number	Description
8	PCD_HPXX_8100_SFF_002	8100 SFF IC5-3.2 4GB/250GB DVD W7RRP-64

Red arrows point to the "Item Number" and "Description" columns of the table. At the bottom of the table, there are navigation buttons and the text "Page 1 of 1 (1 matches)". At the very bottom of the window, there are "OK" and "Cancel" buttons.

# SEARCH OPTIONS

5. Double click on the **Item Number** to reveal the serial number of the unit(s).

Quantity	Item Number	Description
8	PCD_HPXX_8100_SFF_002	8100 SFF ICI5-3.2 4GB/250GB DVD W7RRP-64

6. Once you verify that the serial of the unit is correct and is the one you wish to submit the ticket for, click **OK**.

orer

Select the value for the Serial Number field

Filter values where the [Value Starts with...](#)

Value
2UA0460J0F
2UA0470149
2UA04701BD
2UA04704DF
2UA0470Z74
2UA04713HQ
2UA04713P3
2UA119004V

Page 1 of 1 (8 matches)

Serial Number:

# SEARCH OPTIONS

7. Once the correct serial number has been selected, enter the problem of the unit into the Description of Issue field and click OK.

## TIP

In the Issues window, once the “Original Invoice #” is showing, you can also go back into the search to verify the unit or if unit is still under warranty.

For warranty information, find the warranty line in the invoice and compare it to the invoice date.

Issues - Internet Explorer

**Issues**

Item Number: PCD\_HPXX\_8100\_SFF\_002 Serial Number: 2UA0460J0F

Item Number Description: 8100 SFF ICi5-3.2 4GB/250GB DVD W7RRP-64

Quantity to Receive: 1

Description of Issue: Unit will not power on.

Original Invoice #: INV166613 Original Invoice Date: 10/2/2014

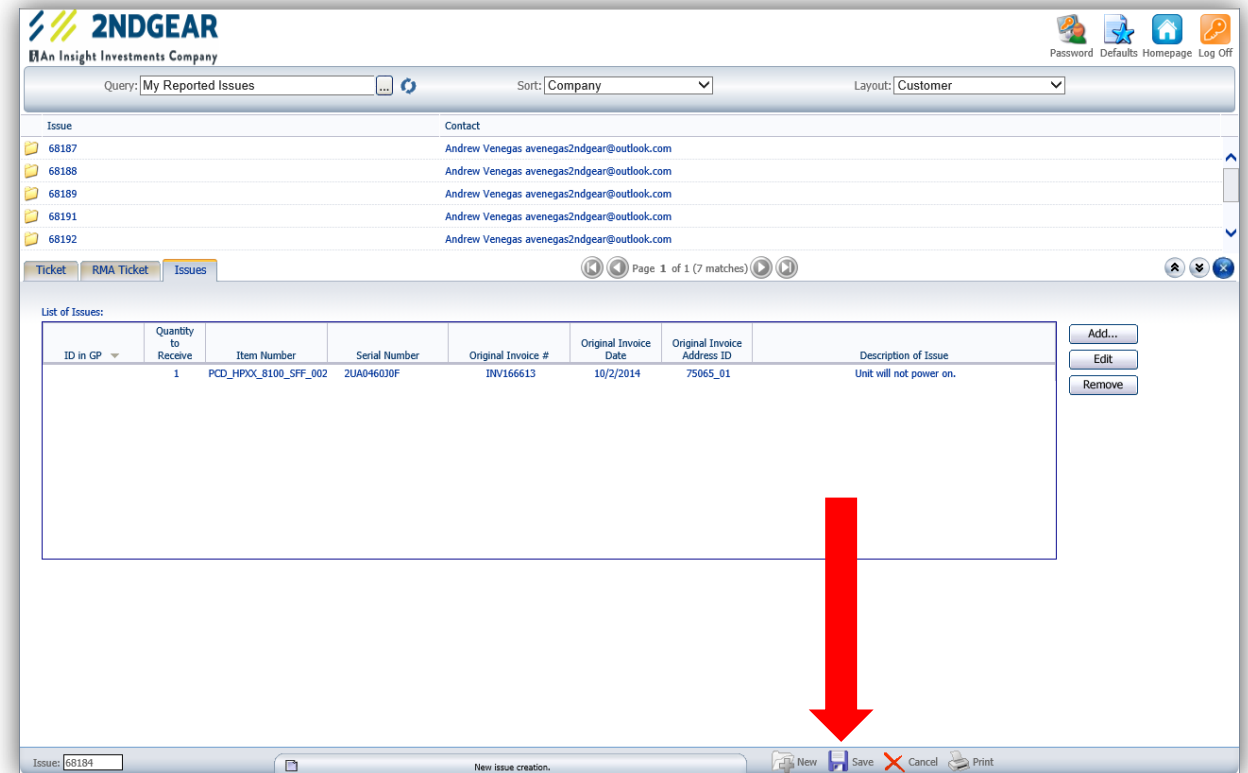
Original Invoice Address ID: 75065\_01

OK Cancel

# SUBMITTING A TICKET

Once all of the information has been entered about your unit, click “Save” at the bottom of the page to **submit** your ticket.

From here, you can **Cancel** the ticket if needed to as well.




The screenshot shows the 2NDGEAR web application interface. At the top, there's a header with the 2NDGEAR logo and navigation links. Below the header, there's a search bar with 'My Reported Issues' and a 'Sort: Company' dropdown. The main content area is divided into two sections: 'Issue' and 'Contact'. The 'Issue' section lists several issues with IDs 68187, 68188, 68189, 68191, and 68192. The 'Contact' section lists the contact information for each issue, all pointing to Andrew Venegas. Below this, there's a 'Ticket' tab and an 'Issues' tab. The 'Issues' tab is active, showing a 'List of Issues' table. The table has columns for 'ID in GP', 'Quantity to Receive', 'Item Number', 'Serial Number', 'Original Invoice #', 'Original Invoice Date', 'Original Invoice Address ID', and 'Description of Issue'. There is one row of data: ID 68184, Quantity 1, Item PCD\_HPXX\_8100\_SFF\_002, Serial 2UA0460J0F, Invoice # INV166613, Date 10/2/2014, Address ID 75065\_01, and Description 'Unit will not power on.'. To the right of the table are buttons for 'Add...', 'Edit', and 'Remove'. At the bottom of the page, there's a 'New Issue creation.' section with a 'New' button and a 'Save' button. A large red arrow points to the 'Save' button.


ID in GP	Quantity to Receive	Item Number	Serial Number	Original Invoice #	Original Invoice Date	Original Invoice Address ID	Description of Issue
68184	1	PCD_HPXX_8100_SFF_002	2UA0460J0F	INV166613	10/2/2014	75065_01	Unit will not power on.








# SUBMITTING A TICKET



All submitted tickets can be reviewed at any time simply by clicking on the issue numbers available in your list.


Once you submit a ticket, we'll take it from there and do our best to take care of your request and take care of you.

  
An Insight Investments Company

Query:   Sort:

Issue	Contact
 68187	Andrew Venegas <a href="mailto:avenegas2ndgear@outlook.com">avenegas2ndgear@outlook.com</a>
 68188	Andrew Venegas <a href="mailto:avenegas2ndgear@outlook.com">avenegas2ndgear@outlook.com</a>
 68189	Andrew Venegas <a href="mailto:avenegas2ndgear@outlook.com">avenegas2ndgear@outlook.com</a>
 68191	Andrew Venegas <a href="mailto:avenegas2ndgear@outlook.com">avenegas2ndgear@outlook.com</a>
 68192	Andrew Venegas <a href="mailto:avenegas2ndgear@outlook.com">avenegas2ndgear@outlook.com</a>
 68193	Andrew Venegas <a href="mailto:avenegas2ndgear@outlook.com">avenegas2ndgear@outlook.com</a>
 68194	Andrew Venegas <a href="mailto:avenegas2ndgear@outlook.com">avenegas2ndgear@outlook.com</a>

  Page 1 of 1

Issue:   Ready. Click New to create a new issue.





If you have any questions, contact our Customer Service Department at [customerservice@2ndgear.com](mailto:customerservice@2ndgear.com) or call (800) 506-6704.